

**BIOTECH PIONEER
RECOGNIZED**

**Dr. Zaffaroni
Receives
2006 Biotech
Heritage
Award**



Dr. Zaffaroni was recognized for outstanding achievements at BIO 2006.

The Chemical Heritage Foundation (CHF) and Biotechnology Industry Organization (BIO) presented the 8th Annual Biotechnology Heritage Award to Alejandro Zaffaroni, a pioneer of the biotechnology revolution and a legendary entrepreneur with considerable scientific and business skills. The award was presented at the BIO 2006 conference in Chicago.

"Dr. Zaffaroni's scientific contributions, particularly in the area of drug delivery, have enhanced healthcare for people throughout the world," says BIO President Jim Greenwood. "His steadfast commitment to research and development has earned him more than two dozen patents and the deep-founded respect of his colleagues."

Over a long and distinguished career, Dr. Zaffaroni founded and cofounded many companies. Among his many awards he received the National Medal of Technology from President Clinton in 1995.

SOURCE: BIOTECHNOLOGY INDUSTRY ORGANIZATION, WASHINGTON, D.C.

BIO BOOM

**Bioscience Industry Fuels
Jobs and Growth for States**

**U.S.'s 1.2 Million Bioscience Jobs Generate
Additional 5.8 Million Jobs**

States and regions across the country are working to develop and promote the growth of their bioscience bases, according to the study Growing the Nation's Bioscience Sector: State Bioscience Initiatives 2006, released by Battelle and the Biotechnology

Industry Organization (BIO). The biosciences are a growing and vibrant sector of the U.S. economy, with more than 40,000 businesses employing 1.2 million people in all 50 states, Puerto Rico, and the District of Columbia.



SOURCES: BIOTECHNOLOGY INDUSTRY ORGANIZATION, WASHINGTON, D.C.; AND BATTELLE, COLUMBUS, OHIO

Riding the BIO Wave

- **Total employment in the biosciences in the United States reached 1.2 million in 2004**, with bioscience workers found in all 50 states and Puerto Rico. The highest rate of growth in jobs is in the research, testing, and medical laboratories sector.
- The nation's **1.2 million bioscience jobs generated an additional 5.8 million jobs** in the economy. **Each bioscience job in the United States generates 5.7 additional jobs** in affiliated industries.
- **States are spending billions of dollars to support bioscience research and development**, with research funds and construction of academic and medical facilities.
- **States are using investment funds and tax incentives to attract large industry anchors** instead of solely focusing on launching and growing new bioscience ventures.
- **Smaller states that have not traditionally invested** in building bioscience industries are beginning to do so.

DRUG SALES REPORT

**\$366.62 Billion
in Drug Sales,
a 5% Increase**

IMS Health reports a 5% increase in drug sales through retail pharmacies in 13 key markets in the 12-month period from December 2004 to December 2005, closing at \$366.62 billion. IMS also reports that 2005 total global pharma sales increased 7% to \$602 billion. In the major markets, audited growth was 5.7% in 2005, compared with 7.2% the previous year. This group accounts for 81% of the



Industry attention is shifting to smaller, developing markets that are performing exceptionally well, says Murray Aitken, IMS Senior VP, Corporate Strategy.

total global pharmaceutical market, but emerging markets, including China, Korea, Mexico, Russia, and Turkey all experienced double-digit growth, outpacing global performance and signaling important shifts in the marketplace.

Market Updates

- Sales in the top five European markets showed a 4% constant exchange growth.
- North America posted a 4% sales growth at \$194.69 billion in sales in the 12 months to December. The key therapy growth area for North America was the cytostatic group with a 15% growth at constant exchange.
- The single largest therapeutic subcategory in dollar sales continues to be the hypolipidemia class, selling \$28.09 billion with a

**The Top 5 Best-Selling
Drugs in 2005**

- | | |
|------------|-------------|
| 1. Lipitor | 4. Plavix |
| 2. Nexium | 5. Seretide |
| 3. Zocor | |

**The Top 5 Companies
in 2005**

- | | |
|-------------|----------------|
| 1. Pfizer | 4. Merck |
| 2. GSK | 5. AstraZeneca |
| 3. Novartis | |

**The Top 5
Therapeutic Classes**

- | | |
|--------------------|----------|
| 1. Cardiovascular | \$71,861 |
| 2. CNS | \$67,728 |
| 3. Alimentary | \$51,571 |
| 4. Respiratory | \$32,846 |
| 5. Anti-Infectives | \$29,680 |

Note: \$ are in millions

growth of 6% in the 12 months to December 2005, a slight decrease from the last survey. The second biggest group is the anti-ulcerant class at \$22.44 billion and with a 2.4% growth.

SOURCE: IMS HEALTH, IMS RETAIL DRUG MONITOR, LONDON



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IN MEMORIAM

Kathy Laudani Fund Established



Kathy Laudani

The Kathy Laudani Memorial Fund has been established for the educational benefit of her children, Anna and Joey.

Ms. Laudani, who passed away February 13th, had more than 20 years of medical marketing experience in media, CME, and list sales. She was active in the Midwest Healthcare Marketing Association.

For information regarding donating to the fund, please visit mhma.com/newsletter/memorial.html, or contact the Midwest Healthcare Marketing Association at 630-416-1166, or e-mail mhma@mhma.com.

Docs Issue a No-Go On Pay For Performance

Two-thirds of physicians do not support President Bush's pay-for-performance plan.

In response to the American Medical Association's recent pact with Congress to develop more than 100 standard measures of performance, physicians from across the United States have voiced their opinions on this issue. An HRA Research Internet study of physician attitudes on pay-for-performance and quality of care found that almost two-thirds of the 2,727 doctors surveyed do not support the Bush administration's push to publicize performance of healthcare providers and link

- 92% of the physicians surveyed stated that they believe specialty medical societies (not the American Medical Association) should be given the responsibility to craft measurement criteria within their areas of expertise.
- 62% of the doctors surveyed do not support the Bush administration's push to publicize performance of healthcare providers and link Medicare payments to quality via pay-for-performance arrangements.
- 46% of doctors have witnessed insurance companies, consumer groups, and large employers who pay for healthcare requesting information on quality of care.
- 44% of doctors reported that they are not sure if they agree or disagree with the accord that the AMA and Congress forged.
- 41% of doctors do not believe that the standard measures of performance that the AMA will develop will result in improved quality of care for patients.
- 36% of doctors are unsure if they are open to the concept of pay for performance.
- 23% of doctors do not believe that it is necessary for the AMA to develop any standard measures of performance.

Medicare payments to quality via pay-for-performance arrangements.

Even though the majority of the physicians surveyed do not

support the concept of linking payment for healthcare services to quality, HRA analysts say the real story is not what doctors know but what they don't know.

LOGGING ON AND PLUGGING IN

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Sponsored by GfK Market Measures and Wilson Learning
- **Medicare Part D:** Diagnostic and Strategic Opportunity Assessment
Sponsored by Model N
- **Patient Non-Adherence**
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- **Building an e-Learning Competency Center**
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Recorded at the CBI Patient Compliance Adherence Conference, April 2006

- **Innovation: Personalizing Patient Compliance**
Featured Thought Leader:
Kevin Wildenhaus, Ph.D., Director of Behavioral Science, HealthMedia Inc.

Recorded at the BIO 2006 International Convention, April 2006

- **Game-Changing Event: Billionaire Lifting N.C. to Top of Biotech Industry**
Featured Thought Leader: David Murdock, CEO of Dole Foods